



STATE OF CALIFORNIA

CUSTOMER SERVICE SPECIALIST, FTB

State of California

Franchise Tax Board

DEPARTMENTAL PROMOTIONAL EXAMINATION

Locations: Sacramento, Oakland, Los Angeles,
San Diego and Santa Ana

Final Filing Date: August 26, 2015

MISSION STATEMENT

Mission of the Franchise Tax Board: Our mission is to provide the services and information to help taxpayers file accurate and timely tax returns and pay the proper amount owed. To accomplish this mission, we develop knowledgeable and engaged employees, administer and enforce the law with fairness and integrity, and responsibly manage the resources allocated to us.

EEO

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.

DRUG FREE STATEMENT

It is an objective of the state of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service and the special trust placed in public servants.

WHO SHOULD APPLY?

Applicants who meet the minimum qualifications as stated below may apply for this examination. All applicants must meet the education and/or experience requirements as stated on this examination announcement.

This is a promotional examination for Franchise Tax Board (FTB). In order to take this examination:

1. Applicant must have a permanent civil service appointment without a break in service, with the Franchise Tax Board, by the final filing date; **or**
2. Applicant must be a current or former employee of the Legislature for two or more years as defined in Government Code Section 18990; **or**
3. Applicant must be a current or former non-elected exempt employee of the Executive Branch for two or more consecutive years as defined in Government Code Section 18992; **or**
4. Applicant must be a person retired from the United States Military, honorable discharged from active duty with a service-connected disability; or honorably discharged from active duty as defined in Government Code Section 18991. **Veterans must provide a copy of their DD214 for entrance requirements.** Please attach your DD214 to your application. **Veterans' preference will not be granted in promotional examinations.**

For applicants under items 2, 3, or 4, if promotional examinations are given by more than one department for the same classification, the applicant must select one department in which to compete. Refer to the General Information, Promotional Examinations Only section of this bulletin for other eligibility requirements. Under certain circumstances, former FTB employees may be allowed to compete under the provisions of Rule 235.

FILING INSTRUCTIONS

FINAL FILING DATE TO SUBMIT AN APPLICATION: AUGUST 26, 2015

Applications (STD. 678) are available at CalHR's website www.jobs.ca.gov or FTB's website at www.ftb.ca.gov.

Applications can be filed either:

In Person:

Franchise Tax Board
9646 Butterfield Way
Sacramento Bldg., Exam/Certification Unit
Sacramento, CA 95827

By Mail:

Franchise Tax Board
ATTN: Exam/Certification Unit
P.O. Box 550
Sacramento, CA 95812-0550

APPLICATIONS MUST CONTAIN ORIGINAL SIGNATURES AND MUST BE SUBMITTED TO THE ADDRESS INDICATED ABOVE.

Applications (STD.678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered, or received via interoffice mail after the final filing date will not be accepted.

NOTE: TO TAKE THIS EXAMINATION, YOU MUST PROVIDE AN EMAIL ADDRESS ON YOUR APPLICATION.

The Qualification Assessment (QA) exam link will be sent to the email address that you provide. All exam notification (except the QA link) will be sent by mail.

SPECIAL TESTING ARRANGEMENTS

If you have a disability and need special assistance or special testing arrangements, contact Franchise Tax Board (FTB), Examination/Certification Unit at (916)845-3608, or via the California Relay Service for the Deaf or Hard of Hearing at (800)735-2929 from TTY phones and (800) 735-2922 from voice phones.

Additionally, please select the "Reasonable Accommodations" box when filling out the application.

SALARY

Range A: \$ 2,945.00 - \$3,690.00

Range B: \$ 3,189.00 - \$3,992.00

Range C: \$ 3,824.00 - \$4,788.00

ELIGIBLE LIST INFORMATION

A departmental, promotional merged list will be established for the Franchise Tax Board. The names of successful competitors will be merged onto the eligible list in order of final scores regardless of test date. List eligibility will expire 12 months after it is established. Competitors will be able to retake the exam (Qualifications Assessment) after 9 months to reestablish list eligibility.

NOTE: In order to maintain list eligibility, competitors must participate in the current exam administration.

REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

NOTE: All applicants must meet the education and/or experience requirements as stated on this examination bulletin by the final filing date. Your signature on your application indicates that you have read, understood, and possess the qualifications required.

Applications/resumes **MUST** contain the following information: "to" and "from" dates (month/day/year), time base, civil service class title(s), and range, if applicable. College course information **MUST** include: title, semester or quarter credits, name of institution, completion dates, and degree (if applicable).

Applications/resumes received without this information may be rejected.

NOTE: It is especially important that each applicant take special care to accurately and completely fill out their application. List all experience relevant to the "Minimum Qualifications" shown on this announcement.

MINIMUM QUALIFICATIONS

Experience applicable to either of the following patterns may be combined on a proportional basis to meet the total experience requirements. Additionally, State experience applied toward the non-State experience pattern must be in a class at a level of responsibility at least equivalent to that of one of the classes specified in the promotional State experience pattern.

Either I

Experience: Six months of experience in the California state service performing duties at a level of responsibility equivalent to that of either a Tax Technician, Franchise Tax Board, Range B, or performing tax compliance duties at a level of responsibility equivalent to Tax Program Technician II, Franchise Tax Board.

Or II

Experience: One year of experience in the California state service performing tax compliance duties of a class at a level of responsibility equivalent to a Tax Program Technician I, Franchise Tax Board.

Or III

Education: Equivalent to graduation from college. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment). (Additional experience performing professional duties involving client-customer service contact, interpretation or explanation of policies, regulations, or procedures for a public agency or private institution such as a bank, insurance company, credit bureau, or title company may be substituted for the required education on a year-for-year basis for up to two years of the required education).

Or IV

Experience: Four years of increasingly responsible experience in a financial, commercial, or governmental enterprise, at least one year of which shall include client-customer service contact, interpretation or explanation of policies, regulations, or procedures for a public agency or private institution such as a bank, insurance company, credit bureau, or title company.

PROOF OF EDUCATION

Applicants using education to meet the minimum requirements must provide a copy of their diploma, official/unofficial transcript, statement and/or evaluation from an accredited U.S. college or university with their examination application. If an applicant is not able to provide proof of education from a recognized institution at the time of hire, their name may be removed from the eligible list(s).

FOREIGN DEGREES

Applicants with foreign transcripts must provide an official/unofficial foreign transcript evaluation that indicates the number of units to which his/her foreign course work is equivalent. FTB accepts foreign transcript evaluations that are completed by one of the agencies approved by the California Commission on Teachers Credentialing. Agencies accredited by the Commission for Foreign Transcription Evaluation may be found on the Commission's website: www.ctc.ca.gov.

NOTE: All documents submitted become the property of the FTB. Do not submit original diplomas with the examination application.

POSITION DESCRIPTION

Under the general direction from a Customer Service Supervisor, FTB, a Customer Service Specialist independently performs analysis of the most complex reviews, provides specialized customer service support, or serves as a lead person and quality assurance monitor for Tax Technicians, FTB, who perform tax account services for taxpayers and other FTB customers. Incumbents directly respond to the most sensitive and complex customer contacts, including irate callers, tax preparation professionals, and others in need of assistance.

Position(s) exist in Sacramento, Oakland, Los Angeles, San Diego, and Santa Ana.

EXAMINATION INFORMATION

Qualifications Assessment -- Weighted 100%

This examination will consist of a Qualifications Assessment weighted 100%. Candidates must attain an overall minimum score of 70% in order to be placed on the eligible list.

NOTE: It is especially important that each applicant take special care to accurately and completely fill out their application. List all experience relevant to the "Minimum Qualifications" shown on this announcement.

CANDIDATES WHO DO NOT COMPLETE OR SUBMIT THE QUALIFICATIONS ASSESSMENT BY THE DUE DATE WILL BE DISQUALIFIED.

NOTE: If conditions warrant, this examination may utilize an evaluation of each candidate's experience and education compared to a standard developed from the class specification. For this reason, it is especially important that candidates take special care in accurately and completely filling out their application. List all experience relevant to the "Requirements for Admittance to the Examination" shown on this announcement.

SELECTION PLAN

It is anticipated that candidates who meet the minimum qualifications for this examination will be sent an email the **week of October 12, 2015**, which will contain the instructions and the link to complete the online Qualifications Assessment (QA) examination. **It is the candidate's responsibility to read the letter that is enclosed with their acceptance notice which provides specific instructions/dates about the QA link. It is also the candidate's responsibility to contact Franchise Tax Board's Examination/Cert Unit at (916) 845-3608 if they have not received the QA link by the date indicated on the letter.**

SCOPE OF EXAMINATION

Candidates should be prepared to answer pre-determined, job-related questions identified under the Knowledge, Skills, Abilities, and Personal Characteristics.

KNOWLEDGE, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS

Knowledge of:

1. Basic PC functions and Microsoft Office applications, including the internet, email and other functions needed for work-related activities.
2. The uses and functions of office equipment (e.g., calculator, copier, fax machine, telephone) to perform administrative duties.
3. Basic math (e.g., addition, subtraction, multiplication, division, percentages) to review and process workload.
4. Basic accounting practices (e.g., review balance sheets, financial statements, calculate claims or penalties, debits and credits).
5. Types of business organizations (e.g., sole proprietorships, partnerships, corporations, limited liability corporations, and limited liability partnerships).
6. Basic components of Personal Income Tax and Business Entity Tax returns (e.g., income, deductions, exemptions, credits) to complete relevant job assignments.
7. IRS and FTB security requirements concerning taxpayer privacy and disclosure of taxpayer information.
8. Basic customer service skills to effectively represent FTB to taxpayers and other customers.
9. The structure and content of the English language, including the meaning and spelling of words, rules of composition and grammar.
10. FTB policies regarding conflict of interest, sexual harassment and workplace violence in order to avoid personal conduct that is inappropriate.
11. FTB programs, computer systems and data bases (e.g., TI, BETS, ARCS, INC).
12. Departmental and unit procedures and guidelines to complete workloads in compliance with FTB standards.
13. The electronic services available to taxpayers to assist them to file taxes and pay outstanding tax liabilities.
14. Taxpayer Bill of Rights and Principles of Tax Administration.
15. Problem-solving techniques to identify and resolve problems and issues related to the completion of work assignments.
16. Traits or qualities that are necessary to succeed as a lead worker (e.g., communicates effectively, delegates, inspires, motivates and empowers team members, etc.).

Skill to:

1. Provide technical assistance to departmental staff, taxpayers and their representatives, external clients, other agencies and third parties.
2. Read, comprehend and interpret complex information (e.g., laws, regulations, policies and/or procedures) to determine the main ideas, apply information and take the appropriate action.
3. Verbally explain laws, rules, regulations, policies and procedures to departmental staff, taxpayers or their representatives, external clients, other agencies and third parties in an effective manner using proper vocabulary and word use.
4. Explain in writing laws, rules, regulations, policies and procedures to departmental staff, taxpayers and their representatives, external clients, other agencies and third parties in an effective manner using proper grammar, punctuation and spelling.
5. Perform a variety of math computations, such as formulas and percentages.
6. Read and interpret numerical data in order to explain it to members of the general public, as well as FTB Staff and others.
7. Formulate and ask relevant questions, on the phone, in writing or in person, in order to help clarify facts, obtain required information, address specific needs or issues at the first point of contact.
8. Interact tactfully and diplomatically with a variety of audiences, including frustrated, angry or otherwise emotional individuals on the phone or in person.
9. Accurately and efficiently enter data into a computerized database.
10. Use personal computer systems and software applications (e.g., including word processing and spreadsheet software) to complete job assignments efficiently and effectively.
11. Use the FTBNet and the Internet, including search engines, to access online tools, individual and business entity account information.

12. Make effective oral or written presentations of complex, technical information in a way that is easy to understand.
13. Use available reference materials to administer the laws, rules, regulations, policies and procedures of the FTB.
14. Edit written material prepared by others to improve the accuracy, clarity, and effectiveness of documents sent out to the public.
15. Review completed forms, documents or online transactions to identify missing information, misinformation, and inappropriate content and/or errors.

Ability to:

1. Quickly learn new information and retain previously learned information to successfully perform duties.
2. Analyze situations accurately, using logic and good judgment, to take effective action.
3. Apply proper laws, rules, regulations, policies and/or procedures that will produce correct outcomes.
4. Apply specialized knowledge acquired through training to successfully perform duties.
5. Work effectively within the political, organizational, and technological systems and limitations of the department.
6. Demonstrate responsible conduct, professional behavior, and a positive attitude to achieve desired outcomes and ensure good relations.
7. Apply standards of ethical conduct and understand the impact of violating these standards on the organization, self and others.
8. Relate well to individuals with diverse backgrounds and different levels of education and experience.
9. Treat individuals with fairness, courtesy and respect.
10. Effectively plan, organize and manage information, work and time.
11. Be receptive to change and adapt quickly to achieve organizational goals.
12. Listen carefully and give full attention to what others are saying, asking questions as appropriate and not interrupting at inappropriate times.
13. Work cooperatively and productively as a member of a team to achieve a common goal.
14. Be flexible in adjusting to changing priorities and new workloads that may impact other planned projects and assignments.
15. Stay calm in stressful situations and maintain composure in the face of stress producing stimulus such as interactions with hostile individuals.
16. Demonstrate assertiveness, firmness and discretion in communications with taxpayers and others, while remaining empathetic to their personal circumstances.
17. Combine data from multiple sources, identify relevant patterns of information and develop a comprehensive and accurate picture of the situation.
18. Manage multiple or competing priorities in order to complete tasks within established timeframes.
19. Maintain a positive attitude, accept constructive feedback, and not take challenges personally in order to improve performance.
20. Recognize potential conflicts, problems, or issues outside the scope of responsibility and refer to appropriate sources for guidance or resolution.
21. Persist in following a course of action and overcome obstacles in order to complete an assignment, resolve an issue or achieve a goal.
22. Behave responsibly and be accountable for actions taken in order to maintain your credibility.
23. Gain the cooperation of others and work cooperatively in a team environment to increase efficiency and effectiveness.
24. Give constructive feedback on work products and practices in order to improve the work performance of others.
25. Work independently on projects or assignments without close supervision or detailed instruction.
26. Negotiate with taxpayer or their representatives regarding amounts to be.

Personal Characteristics:

1. Keep managers, staff and others informed about progress and problems and be open-minded, patient and respectful when dealing with others.
2. Share expertise and serve as a resource to colleagues and other staff to improve team effectiveness and promote staff development.

3. Work overtime or adjust your schedule to meet workload demands.

BENEFITS

To learn more about the comprehensive benefit package please visit the CalPERS website at <http://www.calpers.ca.gov>.

VETERANS' PREFERENCE

Veterans' Preference will not be granted in the examination, as it does not meet the requirements to qualify for Veterans' Preference.

CAREER CREDITS

Career Credits will not be added to the final score of this examination.

CONTACT INFORMATION

For additional information regarding this examination, please contact the Franchise Tax Board Examination/Certification Unit at (916) 845-3608.

DISCLAIMER

Please click on the link below to review the official California State Personnel Board class specification:
<http://jobs.spb.ca.gov/wvpos/jobspecs.cfm>

GENERAL INFORMATION

The Franchise Tax Board (FTB) reserves the right to revise the examination plan to better the needs of the service if the circumstances change under which this examination was planned. Such revision will be in accordance with civil service laws and rules and all candidates will be notified.

It is the candidate's responsibility for an examination without a written feature to contact the Franchise Tax Board three weeks after the final filing date if he/she has not received any notification.

It is the candidate's responsibility for an examination with a written feature to contact the Franchise Tax Board six weeks after the final filing date if he/she has not received any notification.

If a candidate's notice was not received due to a verified postal error, he/she will be rescheduled upon written request. It is the candidate's responsibility to contact the Franchise Tax Board at (916) 845-3608.

Examination Locations: When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. However, locations of interviews or performance evaluations may be limited or extended as conditions warrant.

Examination Applications are available at www.jobs.ca.gov, CalHR State Jobs Center, State Personnel Board offices, local offices of the Employment Development Department and the testing department on this job bulletin.

If you meet the requirements stated on this bulletin, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

Candidates needing special testing arrangements due to a disability must mark the appropriate box on the application and/or contact the testing department.

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

Eligible Lists: Eligible lists established by competitive examination, regardless of date, must be used in the following

order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

If Promotional Examinations Only: Competition is limited to employees who have a permanent civil service appointment and military veterans that meet all the minimum qualifications. Under certain circumstances, other employees may be allowed to compete under provisions of Rules 234, 235, and 235.2. State Personnel Board Rules 233, 234, 235, 235.2, and 237 contain provisions regarding civil service status and eligibility for promotional examinations. These rules may be reviewed at <http://www.spb.ca.gov/>.

If High School Equivalence is Required: Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis. NOTE: For peace officer classifications please refer to the testing department for special requirements.

Veterans' Preference: California Law (Government Code 18971-18979) allows the granting of Veterans' Preference in Open entrance and Open, Non-Promotional entrance examinations. Veterans' Preference will be granted to all competitors who are successful in these types of examinations, and who qualify for and have requested the Veterans' preference by mail. In Open entrance examinations, Veterans' Preference is granted to competitors who achieve a passing score, shall be placed in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for Veterans' Preference.

Employees who have achieved permanent State civil service status are not eligible to receive Veterans' Preference. Permanent State civil service status means the status of an employee who is lawfully retained in his/her position after completion of the applicable probationary period. This includes permanent intermittent, part-time, and full-time appointments. In addition, individuals who at any time achieved permanent State civil service status and subsequently resigned or were dismissed from State civil service are not eligible to receive Veterans' Preference. Veteran status is verified by CalHR.

How to Apply for Veterans' Preference: Directions to apply for Veterans' Preference Points are on the Veterans' Preference Application ([CalHR 1093](#)) which is available at www.jobs.ca.gov or from CalHR, 1810 16th Street Sacramento, CA 95811 and the Department of Veterans Affairs. For additional information, go to Department of Veterans' Affairs website at www.cdva.ca.gov.

Felony Disqualification: You are disqualified from being employed as a peace officer if: (1) You have been convicted of a felony in California or any other state; (2) you have been convicted of any offense in any other state which would have been a felony if committed in California; (3) you have been charged with a felony and adjudged by a superior court to be mentally incompetent; (4) you have been adjudged addicted or in danger of becoming addicted to narcotics, convicted, and committed to a State institution. If you have been convicted of a felony, you may be allowed to participate in this examination if your conviction(s): (1) has/have been sealed under Penal Code Section 851.7, 851.8, 1203.45, or Health and Safety Code Section 11361.5; (2) has/have been expunged or is/are expugnable pursuant to Health and Safety Code Section 11361.5 regarding marijuana offenses; (3) was/were stipulated or designated to be a lesser included offense of marijuana possession under Health and Safety Code Section 11557 or 11366.

TDD is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TDD Device. California Relay Service (Telephone) for the deaf or hearing impaired. From TDD phones: 1-800- 735-2929 or from voice phone: 1-800-735-2922.

Franchise Tax Board, Examination/Certification Unit

P.O. Box 550, Sacramento, CA 95812-0550

Phone: (916) 845-3608

Website: www.ftb.ca.gov